

MONTERREY
Statement of Work
2020 External Consultant to perform Market Assessment and Business Analysis for the
Binational Center in Monterrey

1. PERFORMANCE WORK STATEMENT

The purpose of this contract is to obtain external consulting services to analyze the market and business model of the Binational Center in Monterrey – henceforth referred to as “**BNC**”.

The BNC in Monterrey is a non-profit organization that offers English Language courses for children, teens, and adults, English for business, and inclusive education. It also has a Higher Education Division, Cultural Division, and a Public Library.

The goal of this analysis is for the consultant (henceforth referred to as the “**Vendor**”) to foster insight into market conditions so that the BNC can make better business decisions. The Vendor shall obtain evidenced based data (external and internal) to make recommendations on market trends and how the BNC should maximize value to the community, grow new student enrollment and retention, find new sources of revenue, and increase profitability.

- The Vendor shall perform an internal and external SWOT Analysis of the current business model and market trends, also considering disruptive models such as the impact of new technology.
- The Vendor shall identify and survey at least five local competitors and report on current market trends regarding English language teaching, including trends in English teaching in local public and private schools and trends in on-line instruction.
- The Vendor shall analyze the BNC’s current sales and marketing model and make recommendations, using data driven indicators.
- The vendor shall analyze the local market and recommend new market niches or new business opportunities.
- The Vendor shall make recommendations on how to improve the BNC’s offerings and customer satisfaction.
- The Vendor shall make recommendations on how to optimize the BNC’s marketing and communication techniques, including social media marketing, using key indicators.
- The Vendor shall make recommendations on how to optimize the BNC’s internal operations.

2. WORK REQUIREMENTS

The contract shall consist of the comprehensive evaluation, analysis, recommendation and implementation of a market and business strategy, including a marketing analysis and communication plan, for the BNC’s profitability.

The Vendor shall furnish all managerial, administrative, labor, and materials that are necessary to accomplish all work as required by this purchase order. Performance requirements for required work are described below.

2.1. Business Analysis and Recommendations:

The Vendor will work cooperatively with the BNC to analyze the past five years of sales, marketing trends, revenue, and expenses to identify long-term revenue trends and projections.

2.1.1. The Vendor shall identify and survey at least five local competitors and report on current market trends regarding English language teaching. The Vendor shall analyze and evaluate current trends in on-line English language instruction, and current trends in English language teaching in local public and private schools.

2.1.2 Based on its research, the Vendor shall perform a SWOT analysis (internal and external) to discuss the current BNC's business model and make recommendations to make the BNC more agile and responsive to the current business environment, boosting its value, revenue, and sales.

2.1.3 The Vendor shall analyze the BNC's current sales and marketing model and make recommendations, using data driven indicators and models.

2.1.4 The Vendor shall make recommendations on how to improve the BNC's offerings and customer satisfaction.

2.1.5 The Vendor shall make recommendations on how to optimize the BNC's marketing and communication techniques, including social media marketing, using key indicators.

2.1.6 The Vendor shall make recommendations on how to optimize the BNC's internal operations.

2.2 Marketing Analysis and Recommendations:

2.2.1. The Vendor will work closely with the BNC's leadership and marketing department to evaluate, analyze, and implement all marketing and communication materials recommended.

2.2.2. The Vendor shall provide a marketing and advertising plan for traditional media (such as radio, television, print media and billboards), social media (such as Facebook and Twitter), and Search Engine Optimization (SEO) including Google, and innovative suggestions to reach new customers and new sources of revenue.

2.2.3 The Vendor shall provide an implementation plan that includes proposed actions to maximize reach to target audiences.

2.2.4 The Vendor shall provide an evaluation plan that reviews the success of the Business Plan, including a review method for the BNC for the impact it has in given data models, engagement metrics, as well as through the surveys' findings.

2.2.5 The evaluation will quantify the Business Plan to be specific, measurable, achievable, relevant and time bound.

2.3 Optimization of internal operations:

2.3.1. The Vendor will work closely with the BNC's leadership to analyze the current management model. It will consult with the Directors of its different Departments and listen

to their current working methodology as well as perceived suggestions to improve operations as a start point for the research.

2.3.1. The vendor will analyze all available documents, like performance metrics, finance books, student lists and surveys, social media and study plans, cultural programming plans, previous competition studies and any other documents as required. The vendor will also propose new customer surveys.

2.3.1 The vendor will survey the BNC's Board of Directors concerning their perception of the current situation, their short- and long-term vision for the BNC and suggestions for the BNC's maximization of operations.

2.4. Proposed Timeline

2.4.1 The contractor will begin its assessment on September 20, 2020 and conclude its assessment on December 15, 2020. It will present its findings to the Board on a mutually convenient date between Dec 15, 2020 to Feb 15, 2021.

3. PROJECT FACTORS

The Contractor is to take the following factors into consideration for the accomplishment of the services:

Recognition of the unique role of the Binational Center's non-profit educational model, with significant social and cultural value to the community.

4. EVALUATION FOR CONTRACT AWARD:

4.1 The Purchase Order will be awarded based on a sample business evaluation proposal to increase value to the community, revenue, and sales for an English teaching center.

4.2 The sample Business and Marketing Plan must include a summary of best practices for advertising and reaching new audiences on Mexican social media platforms.

4.3 The sample Business and Marketing Plan submission may be provided in Word or PowerPoint.

4.4 The Vendor's submission should include:

4.4.1 Sample business evaluation proposal in Word or PowerPoint. Please see 4.2 for specific requirements to be included in the sample business proposal. Prior work may be submitted. The submission will only be used to award the Purchase Order and will not be copied or distributed by the USG.

4.4.2 Five client referrals with email and phone number contact information.

4.4.3 Demonstrate the capability and quality of business evaluation and strategy development of the Bidder. Brochure is appreciated.

4.4.5 Proposed working plan with milestones.

4.4.6 Proposed consultant team including each team members resume.

4.4.7 Submission must be submitted using Form SF18 (addendum) considering the following format:

Deliverable	Amount
SWOT Analysis (includes all consulting hours, administrative, labor, materials)	
Business Marketing Analysis (includes all consulting hours, administrative, labor, materials)	
Optimization Report (includes all consulting hours, administrative, labor, materials)	
TOTAL:	

Note: Please refer to Section 2. WORK REQUIREMENTS for details on each Deliverable.

5. SUBMISSION DATE:

5.1. Pre-solicitation conference call will be held on: Wednesday August, 26 2020. At 9:00 a.m. Please register by sending your contact information to MTRProcurement@state.gov.

5.2 Questions can be sent to Procurement Office at MTRProcurement@state.gov. All questions must be received no later than 10:00 a.m. on Friday August, 28,2020.

5.3. Contractor bids are due no later than Friday September 4, at 5:00 pm. All bids must be sent to MTRProcurement@state.gov

6. DELIVERABLES AFTER AWARD:

6.1. Within one week of commencing the project, the winning bidder will hold an initial meeting with the USG and the BNC's Management to understand the mission and scope of activities of the Business and Marketing Plan.

6.2. The winning bidder will provide a preliminary market trend analysis and interim SWOT (internal and external) report within 45 calendar days of the award. The USG and the BNC will have 10 calendar days to review the draft edits and submit comments/changes to the Vendor via the Contracting Officer's Representative (COR).

6.3. By December 15th 2020, the winning bidder will provide the following reports:

- 1) A final SWOT report, including detailed analysis of local trends in English teaching; including insights gained from analyzing local competitors;
- 2) A Business and Marketing analysis, including a detailed marketing plan, and recommendations for new markets and revenue;
- 3) A report containing recommendations for optimal internal organization and operations.

7. COPYRIGHTS

Specifications: Copyright Information:

1. Any approved marketing materials become the sole property of the center for any purpose. The Contractor shall not retain any interests or rights. All information provided or generated is considered confidential and the property of the center.

ADDENDUM

REQUEST FOR QUOTATION (THIS IS NOT AN ORDER)			THIS RFQ <input type="checkbox"/> IS <input checked="" type="checkbox"/> IS NOT A SMALL BUSINESS SET-ASIDE		PAGE 1 OF 8 PAGES
1. REQUEST NO. 19MX5620Q0009	2. DATE ISSUED 08/20/2020	3. REQUISITION/PURCHASE REQUEST NO. PR9383568	4. CERT. FOR NAT. DEF. UNDER BDSA REG. 2 AND/OR DMS REG. 1		RATING
5a. ISSUED BY AMERICAN CONSULATE GENERAL MONTERREY Prol. Alfonso Reyes #150 Valle Poniente, ATTN: GSO MONTERREY, NUEVO LEON 64000 MEXICO			6. DELIVER BY (Date)		
5b. FOR INFORMATION CALL (NO COLLECT CALLS)			7. DELIVERY		
NAME Ana G Garza		TELEPHONE NUMBER		<input type="checkbox"/> FOB DESTINATION <input checked="" type="checkbox"/> OTHER (See Schedule)	
		AREA CODE	NUMBER	9. DESTINATION	
			+1 52 (81) 8047-3380	a. NAME OF CONSIGNEE AMERICAN CONSULATE GENERAL MONTERREY	
8. TO:					
a. NAME		b. COMPANY		b. STREET ADDRESS Prol. Alfonso Reyes #150 Valle Poniente, ATTN: GSO	
c. STREET ADDRESS				c. CITY MONTERREY, NUEVO LEON	
d. CITY		e. STATE	f. ZIP CODE	d. STATE	e. ZIP CODE 64000
10. PLEASE FURNISH QUOTATIONS TO THE ISSUING OFFICE IN BLOCK 5a ON OR BEFORE CLOSE OF BUSINESS (Date) 09/04/2020		IMPORTANT: This is a request for information and quotations furnished are not offers. If you are unable to quote, please so indicate on this form and return it to the address in Block 5a. This request does not commit the Government to pay any costs incurred in the preparation of the submission of this quotation or to contract for supplies or service. Supplies are of domestic origin unless otherwise indicated by quoter. Any representations and/or certifications attached to this Request for Quotation must be completed by the quoter.			
11. SCHEDULE (Include applicable Federal, State and local taxes)					
ITEM NO. (a)	SUPPLIES/ SERVICES (b)	QUANTITY (c)	UNIT (d)	UNIT PRICE (e)	AMOUNT (f)
12. DISCOUNT FOR PROMPT PAYMENT		a. 10 CALENDAR DAYS (%)	b. 20 CALENDAR DAYS (%)	c. 30 CALENDAR DAYS (%)	d. CALENDAR DAYS NUMBER PERCENTAGE
NOTE: Additional provisions and representations <input type="checkbox"/> are <input type="checkbox"/> are not attached.					
13. NAME AND ADDRESS OF QUOTER		14. SIGNATURE OF PERSON AUTHORIZED TO SIGN QUOTATION		15. DATE OF QUOTATION	
a. NAME OF QUOTER					
b. STREET ADDRESS		16. SIGNER			
c. COUNTY		a. NAME (Type or print)		b. TELEPHONE	
				AREA CODE	
d. CITY	e. STATE	f. ZIP CODE	c. TITLE (Type or print)		NUMBER